ABSTRACT

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2   Systems and methods of allocating transactions among business objects are

3   described. Allocation is accomplished using a multi-phase process. In a first phase,

4   allocation of the transactions among a set of business objects is attempted. In a

5   subsequent phase, allocation of transactions that were either unallocated, under-allocated,

6   or over-allocated in the first phase is determined. The second phase includes using a set

7   of allocation rules to identify business objects configured to manually determine

8   allocation of the unallocated, under-allocated, or over-allocated transactions. The

9   invention is applicable to a variety of business objects including people, organizations,

10   accounts, tasks, or the like.